Information Technology
Institutional Research

Special Interest Group

January 30, 2018
# Agenda

- Introductions
- People, Teams, and Special Interest Groups
- Background and Vision
- Guiding Principles, Values, and Expectations
- Project Overview: Scope, Timing, and Objectives
- Where We Are / Where We Are Going
- Project Milestones
- Data Warehouse Conversion
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# Information Technology SIG

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<tr>
<th>Name</th>
<th>Department</th>
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<td>Babette Barnes (IT Team Lead)</td>
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*individuals who are member of the IT and IR SIGs.*
# Institutional Research SIG

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Special Interest Groups

- Information Technology
- Institutional Research
- Records and Registration
- Academic Advising
- Student Finance
**Program Overview – Team**

**Steering Committee**
- Rob Clark
- Mike Frandsen – Workday
- Kathy Karich – Deloitte

Includes representatives from all schools and key University stakeholders

**Project Management**
- Brad Hoenshell – Workday
- Kelly McMullen
- Ted Montemayor – Deloitte
- Julie Myers
- Samantha Singhal
- Nancy Specht

**Change Management**
- Cindy Fronterre

**Student Records & Advising**
- Nafisa Alam
- David Garcia
- Sean Hanna **
- Julia Kraus **
- Stephanie Parks
- Ethan Powell
- Elyane Stewart
- Ray Lozanes – Workday
- Maggie Welsh – Workday
- Doug Dorval – Deloitte

**Student Finance**
- Scott Flaherty
- Liz Powell **
- Hali Skaggs (FA) **
- Steve Skidmore
- Caitlin Abrams – Workday
- Karina Long - Workday
- Michele Dorsey - Workday

**Student Data Warehouse**
- John Podvin **
- Kristen Balonek
- Jeff Meteyer
- Helen Hsu
- Hillary Lincourt
- Mike Salisbury
- Zinan Chowdhury – Entigence
- Lubna Chowdhury - Entigence
- Rumy Sen - Entigence

**Integrations, Conversions & Reports**
- Babette Barnes **
- Integrations:
  - Kristen Balonek
  - Justin Tran
  - Dusty Kodet – Workday
  - Emi Morales – Workday
  - Carlos Yoshimoto - Workday
- Conversions:
  - Paula Yandow-Reilly **
  - Matt Siple
  - Goku Gunakarasen
  - Andrew Dinin - Deloitte
  - Rose Nguyen – Workday
  - Elton Wong - Workday
- Reporting:
  - Mary Fyles
  - Marc Rumsey **
  - Mark Pabilona - Workday

*Special Interest Groups planned across all functional areas to include key stakeholders from student administration, faculty, and the student body.*
Background

Welcome to UR Student!

- The new UR Student system will replace our antiquated legacy Integrated Student Information System (ISIS) in place since the 1980s.

- UR Student (Workday) will manage University of Rochester student finance, records and registration, admissions, financial aid and reporting activities.
Vision

The University of Rochester envisions reliable, high quality student information systems and processes that will:

- **Be flexible and extendable**, accommodating current priorities and requirements, and have the ability to easily evolve with changing and as yet unforeseen academic and administrative realities, such as new forms of assessment and outcome tracking.
- **Provide robust data capture and reporting capabilities, and verified, complete data** to allow the University and our schools to better understand and support progress toward strategic goals, and the progress of our students toward their academic goals.
- **Provide a single integrated source for core student data and services**, and easier, real-time, integration with ancillary and third-party systems.
- **Create a personalized system** that provides users with the information and services they need, when and where they need it.
- **Result in configurable, reliable and automated processes** for students, faculty and staff to achieve better outcomes with less effort.
Guiding Principals

- We will adopt **common business practices** wherever possible to support a consistent experience. We will differ only where absolutely required.

- We will **structure data** to improve our collective reporting and analytic capabilities.

- We will **automate activity** and processes to enable staff to improve service for all stakeholders.

- We value **integrated systems** and processes over disparate systems and processes.

- We will adapt business and academic practices as necessary to implement an **effective solution**.
IT & IR SIG Values

- Respect for all opinions
  - We have different levels of technical expertise.
  - Different pressures, priorities and pain-points.

- Successful partnering with stakeholders
  - Each school has unique requirements.
  - “One size fits all” won’t work in all cases.

- Be accountable for our own work
  - Identify risks and roadblocks
  - Say something sooner rather than later
Expectations & Collaboration

- Provide other teams with inputs in a timely fashion
- Identify and explain necessary requirements on current business processes
- Suggest process improvements where applicable
- Provide input to the benefit of the design as a whole
- Participate in testing activities providing status and feedback
- Identify risks as soon as possible
- Remember think globally and full transparency
# Project Overview – Phase 1 Scope

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<th>Phase 1</th>
<th>Systems Being Replaced</th>
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| - Academic Foundation/Core  
- Engagement  
- Student Finance  
- Student Records and Registration  
- Curriculum Management  
- Academic Advising  
- Data Warehouse for Student Finance, Student Records and Academic Advising | - ISIS  
- CDCS  
- Darden (Simon)  
- SON Database (SON) – partial  
- Warner Internet (WAIS) - partial  
- Web Registration (Touchnet)  
- Instructor Access  
- Advisor Access  
- Student Access  
- Alumni Access |
Project Overview – Phase 1 Timeline
Project Milestones

- **January 2018**
  - First joint IT/IR SIG meeting
  - Continue DW configuration & prototype
  - Report Definition and review of existing reports
  - Meetings with partnering systems for interfaces

- **February - May 2018**
  - Finalize list of reports
  - Design and Development activities

- **September 2018**
  - End-to-End testing

- **January 2019**
  - Day-in-the-Life testing

- **July 2019**
  - UR Student go live (Workday application and Data Warehouse)

- **October 2019**
  - First fall census from UR Student Data Warehouse
IT/IR SIG Short Term Objectives

- Reporting (IR/Workday Reports)
  1. Confirm Reporting and data analytics requirements have been identified for all academic and administrative units.
  2. Build inventory of standard reports that will need to be built or rebuilt.
  3. Determine where new reports should be built.

- Conversions
  1. Continue Identification of data needed from each of the sources and automated population of IDS.
  2. Establish schedule for conversion of data into Workday.

- Integrations
  1. Continue Integration Family Meetings.
     a. Initial interview with partnering systems.
  2. Start Design, development, and unit testing.
Some Reporting History

- **Design Partner Meetings:**
  - IR discussion started at Yale University (Fall 2014).
  - Plan: Do all internal and external reporting within Workday.

- **Need for a data warehouse became evident as the project evolved.**
  - No point in time or census reporting in Workday.
  - Focus was on functionality vs. reporting.
  - Desire to “own” our data.
  - Interaction with other data marts.

- **Developing a DW strategy in partnership with Entigence.**
  - Collected 500+ reports.
  - Roughly 300+ in scope.
  - Distilled down to 50+ parameterized reports.
Where We Are Going: Next Steps

- Review how things have may have changed since last fall.

- Conversions
  - Continue to work with schools on the data needed for Workday
  - Building timeline for conversions is in process

- Integrations
  - Partnering system meetings
  - Starting Design phase of integrations

- Reporting
  - Identify reports needed for IR SIG members and functional areas for Student Records and Finance
  - Prioritization of reports
Agenda Item: Data Warehouse Conversion

- Current DW goes back to 1987.
- How far back should we go when converting ISIS data into the new warehouse?
- In the new DW, is going back 10, ...15, ...20 years sufficient?
  - How frequently are we asked to report further back?
  - How critical are those requests? (President, Provost, Dean, Chair)
  - If we need to go way back, is access to the old DW sufficient?
- Where does longitudinal reporting fall short with 10, 15, 20 years?
  - PhD time to Degree
  - Enrollment trends over the decades
  - Retention trends
- Loading fewer years will make data cleanup and conversion easier, but limits reporting.
Future Agenda Items

- Potential Agenda Items
  - Discuss how decisions are made on whether a report should come from Workday or the Data Warehouse
    - Reporting Priorities
  - Overview of Conversions
  - Update on project and timeline
  - Additional content from SIG members
Expectations: Communication

Internal
- Provide regular updates to the group on your progress
- Provide immediate alerts to changes in business requirements

External
- Be an advocate for the project
- Promote events
- Use the website
- Answer questions you know and provide feedback
  - forward ones you do not for response
- Participate in UR Student training and support activities
Project Interaction Tools

- Website: [http://www.rochester.edu/urstudent/](http://www.rochester.edu/urstudent/)
Project Interaction Tools

- Email, direct or Contact page on website
- Box – for document sharing
  - Details with link to come
Q&A

- Are there topics you think this session should have covered, but didn’t?
- Are there specific topics we should devote attention to in the future?
- Are there any other questions or concerns?